



smartsheet

# ENGAGE 2019

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ENGAGE 2019

# Project Sheets for the Non-Project Manager

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Sales Engineer



# Introductions



# Agenda

Define project management

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8:35–8:40am

Discuss Smartsheet tools to help you:

Build an awesome project sheet

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8:40 - 9:00am

Get your project team involved

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9:00 - 9:20am

Q&A

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9:20 - 9:30am

# Objectives

Identify Project Management

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Define basic PM terminology

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Manage your project in Smartsheet

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Give your project team visibility & access

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# What is “Project Management”?

# PMI's definition

**A project:** A temporary initiative with a defined beginning and end in time, and therefore defined scope and resources.

Not a routine operation, but a specific set of operations designed to accomplish a singular goal.

A project team often includes people who don't usually work together - sometimes from different organizations and across multiple geographies.

**Project management:** The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

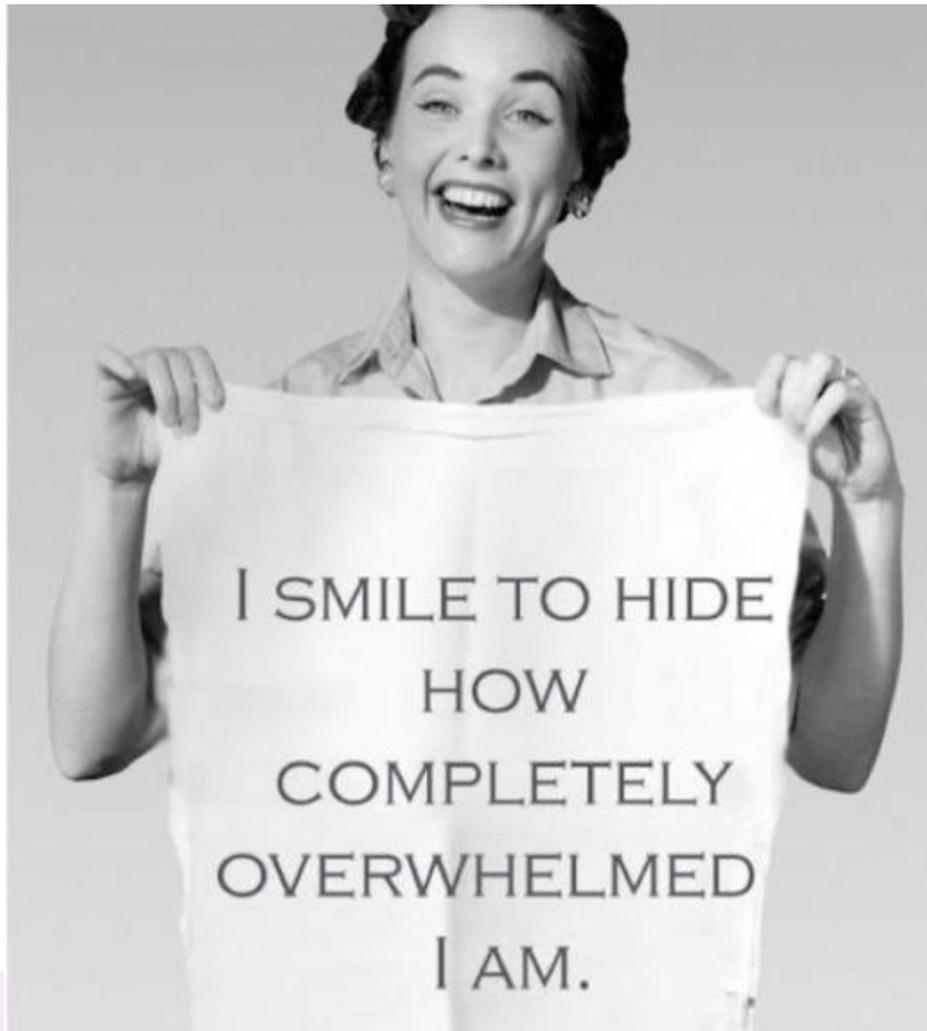
# PMI's definition

## Processes:

- Initiating
- Planning
- Executing
- Monitoring & controlling
- Closing

## Knowledge areas:

- Integration
- Scope
- Time
- Cost
- Quality
- Procurement
- Human resources
- Communications
- Risk management
- Stakeholder management



# The simple version

## Project management:

- A time-bound, coordinated effort...
- ...to reach a specific goal



# Who is a Project Manager?

You Are!

# Setting Up Project Sheets

*Managing Scope,  
Timelines, and People*

# Setting up Project Sheets

1

Prepare the Grid

2

Enable Dependencies

3

Go Agile

4

Add Automation

# Setting up Project Sheets

1

## Prepare the Grid

Set the **foundation** for your project

2

## Enable Dependencies

Effectively manage project **timelines**

3

## Go Agile

Respond to **changes** in the project,  
quickly

4

## Add Automation

Reduce project risk by building  
**consistency**

# Questions?

# Project Visibility & Collaboration

*Getting Your Project Team Involved*

# Project Visibility & Collaboration

1

Share a Project Sheet

2

Send a Project Row

3

Publish your Project

4

Build a Dashboard

# Project Visibility & Collaboration

1

## Share a Project Sheet

Give project stakeholders the  
**right level of access**

2

## Send a Project Row

Collaborate on a single task,  
with anyone

3

## Publish your Project

Give visibility to stakeholders  
that don't use Smartsheet

4

## Build a Dashboard

Make better decisions, faster

# Questions?

# Let's recap

Identify Project Management

---

Define basic PM terminology

---

Manage your project in Smartsheet

---

Give your project team visibility & access

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# Deeper dives



Today 3:45pm – Dashboard Best Practices: Creating Transparency



Today 9:45am – Transform Your Team's Efficiency with Automated Workflows



Tomorrow 11:00am – Taking Formulas to the Next Level

Go get em!





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